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# Military Market

MAGAZINE FOR THE MILITARY RESALE SYSTEM | ARMY TIMES PUBLISHING COMPANY | JUNE 1987 $4.00

# The Latest Package

*'Upscale' AAFES unwraps trendy test store*

**An Analysis of DoD's Commissary Directive**

MMM20R14 12R7 3 06 C 01
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COVER DESIGN BY PAUL JORDAN; COVER PHOTOGRAPH BY TRACY WOODWARD


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serving the military resale system

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# Navy's Million-Dollar List

## *Last year, Navy exchanges were served by 127 suppliers, who did over $1 million worth of business with the system.*

The companies listed in alphabetical order below are those that received their payments at a *single* address. Because the Navy Resale Services and Support Office's computer cut-off point was $1 million, organizations that have multiple billing addresses are not included in this list, even if *total* company billings were more than $1 million.

The sales are for NAVRESSO's fiscal year ending January 1987.

| | |
|---|---|
| ETHAN ALLEN INC. | $1,595,173 |
| AMERICAN GREETING CARDS | 8,219,507 |
| AMERICAN TOBACCO CO. | 7,120,960 |
| ANHEUSER BUSCH | 3,406,445 |
| F.H. ANTHONY & ASSOCIATES | 1,476,378 |
| APPLE COMPUTER INC. | 3,705,271 |
| ARA SERVICES (MAGAZINE AND BOOK DIV.) SAN DIEGO | 1,858,299 |
| ARA SERVICES (MAGAZINE AND BOOK DIV.) NORFOLK | 2,260,997 |
| ELIZABETH ARDEN INC. | 2,003,996 |
| THE ARROW CO. | 2,164,725 |
| ARTEX MFG. CO. | 1,019,496 |
| AUDIOVOX CORP. | 1,089,019 |
| BALFOUR INC. | 1,117,656 |
| BASF SYSTEMS | 1,494,251 |
| BASF CHEMICALS DIV. | 1,106,006 |
| BASKIN ROBBINS INC. | 1,033,034 |
| BEVERAGES FOODS & SERVICE INDUSTRIES INC. | 2,959,084 |
| BLACK & DECKER — HOUSEWARES GROUP | 3,144,694 |
| BLACK & DECKER | 1,410,011 |
| THE BOSE CORP. | 1,671,294 |
| E.J. BRACH & SONS | 1,219,589 |
| BRIGADE BRANDS LTD. | 1,811,691 |
| BROWN & WILLIAMSON TOBACCO CORP. | 5,488,324 |
| CAMPUS SWEATER & SPORTSWEAR CO. | 1,306,929 |
| CANON U.S.A. INC. | 2,172,725 |
| CERTIFIED PRINTING CO. | 2,145,256 |
| CHEVRON CHEMICAL CO. | 1,527,521 |
| COAST DISTRIBUTING CO. | 1,300,908 |
| COCA COLA — LOS ANGELES | 1,293,376 |
| COCA COLA EXPORT CORP. | 2,785,388 |
| COCA COLA CO. — NORFOLK | 1,478,720 |
| COLGATE PALMOLIVE CO. | 1,251,513 |
| COMMODORE BUSINESS MACHINES | 3,151,966 |
| CONOCO INC. | 6,210,337 |
| CREIGHTON INC. | 6,211,164 |
| DAVIS CLOTHING CO. | 2,721,173 |
| EASTMAN KODAK CO. | 8,517,441 |
| EURPAC EAST | 5,746,670 |
| EURPAC WEST | 6,121,627 |
| FARAH MANUFACTURING CO. | 1,096,291 |
| FIELDCREST MILLS | 1,332,527 |
| FISHER PRICE TOYS INC. | 1,106,583 |
| FISHER CORP. | 4,380,579 |
| FLORSHEIM SHOE CO. | 1,006,563 |
| FRITO LAY INC. | 3,306,124 |
| GILLETTE CO. | 3,301,139 |
| GOODYEAR TIRE & RUBBER CO. | 1,790,052 |
| HAGGAR CO. | 2,007,148 |
| ROBERT HALE & ASSOCIATES | 1,825,731 |
| HANES CORP. (HOSIERY DIV.) | 2,089,545 |
| HANES CORP. (KNITWEAR DIV.) | 2,911,189 |
| HEALTH TEX INC. | 2,106,713 |
| HERSHEY CHOCOLATE CO. | 1,466,532 |
| HOFFMAN BEVERAGE CO. | 1,063,327 |
| THE HOOVER CO. | 1,172,651 |
| HUFFY CORP. | 1,704,242 |
| INTERNATIONAL PLAYTEX | 1,434,512 |
| JOCKEY INTERNATIONAL | 1,926,322 |
| C. LLOYD JOHNSON CO. | 3,018,047 |
| S.C. JOHNSON & SON INC. | 1,549,329 |
| JOHNSON & JOHNSON | 2,056,671 |
| JOHN K. KEALY CO. | 3,495,025 |
| KENWOOD ELECTRONICS | 1,036,284 |
| KIMBERLY CLARK CORP. | 1,883,255 |
| KORET OF CALIFORNIA | 1,039,178 |
| L'EGGS PRODUCTS INC. | 1,174,434 |
| LEVER BROTHERS CO. | 1,034,868 |
| LIGGETT & MYERS TOBACCO CO. | 4,734,168 |
| B. LIPPMAN | 2,586,206 |
| LIZ CLAIBORNE INC. | 1,548,051 |
| LORILLARD CORP. | 4,447,615 |
| MAIDENFORM INC. | 1,549,482 |
| MATTEL TOYS INC. | 1,666,874 |
| MAX FACTOR CO. | 1,501,912 |
| MERCURY LUGGAGE MFG. CO. | 1,178,926 |
| MILLER BREWING CO. | 1,636,300 |
| MINOLTA CORP. | 2,760,503 |
| M&M MARS | 2,191,895 |
| MONARCH CROWN CORP. (CLAIROL) | 2,180,496 |
| PHILIP MORRIS INC. | 27,012,706 |
| NABISCO BRANDS INC. | 1,830,813 |
| NCR CORP. | 2,097,892 |
| NEW BALANCE ATHLETIC SHOE INC. | 1,175,703 |
| NIKE INC. | 5,575,013 |
| OLD DOMINION TOBACCO CO, INC. | 1,384,902 |
| ORANGE BLOSSOM | 1,141,826 |
| OSTER DIV. OF SUNBEAM CORP. | 1,089,339 |
| PAULING & CO. | 1,676,956 |
| PAULING OVERSEAS | 1,039,279 |
| PENDLETON WOOLEN MILLS | 1,688,242 |
| PEPSI COLA BOTTLING CO. (SAN DIEGO) | 1,248,793 |
| PIONEER ELECTRONICS | 2,647,275 |
| POLAROID CORP. | 2,146,003 |
| PROCTER AND GAMBLE | 9,851,999 |
| QUAKER STATE OIL | 1,020,448 |
| RAFAEL | 1,073,710 |
| RCA SALES CORP. | 6,769,129 |
| R.J. REYNOLDS TOBACCO CO. | 21,918,900 |
| REVLON INC. | 3,408,691 |
| RTA INTERNATIONAL INC. | 2,566,715 |
| RUBBERMAID INC. | 1,633,188 |
| SAMSONITE FURNITURE CO. | 1,154,755 |
| SANDBERG & SIKORSKI DIAMOND CORP. | 1,064,718 |
| SEAGOING UNIFORM CORP. | 3,543,916 |
| SHARP ELECTRONICS CORP. | 5,178,206 |
| S&K SALES CO. | 1,735,248 |
| SOUTHERN APPAREL CO. | 3,079,188 |
| N.V. SPRING INC. | 1,062,418 |
| SPRINGS INDUSTRIES | 1,226,847 |
| LEVI STRAUSS | 7,356,045 |
| SUPERCOPE MARANTZ INC. | 1,112,790 |
| SYCAMORE MFG, CO. | 1,301,112 |
| SYSTEM DEVELOPMENT CORP. | 1,061,852 |
| TDK ELECTRONICS CORP. | 1,105,191 |
| 3M CO. | 1,968,704 |
| TIMEX CORP. | 1,945,062 |
| TOSHIBA AMERICA INC. | 1,549,411 |
| UNION CARBIDE CORP. | 1,020,443 |
| VANGUARD INDUSTRIES WEST | 2,545,445 |
| VANGUARD MILITARY EQUIPMENT CORP. | 3,529,587 |
| VELVA SHEEN MFG, CO. | 1,422,930 |
| RICHARDSON VICKS INC. (HEALTH CARE) | 1,029,782 |
| WARNER LAMBERT CO. | 1,262,308 |
| WATERFORD CRYSTAL INC. | 1,247,760 |
| WHIRLPOOL CORP. | 5,125,273 |
| WOLVERINE WORLD WIDE (BATES MILITARY DIV.) | 8,391,051 |
| ZENITH ELECTRONICS CORP. | 1,448,646 |

# Military Market index

## COMMISSARIES

| | | FEBRUARY | | | YEAR TO DATE | | |
|---|---|---|---|---|---|---|---|
| | | CY'87 | CY'86 | % CHANGE | CY'87 | CY'86 | % CHANGE |
| | CONUS | $145,498 | $141,731 | 2.66 | $305,889 | $307,300 | -0.46 |
| | OVERSEAS | 29,854 | 28,216 | 5.81 | 62,595 | 56,377 | 11.03 |
| **AIR FORCE** | TOTAL | **175,302** | **169,947** | **3.15** | **368,484** | **363,678** | **1.32** |
| | CONUS | 102,165 | 97,965 | 4.29 | 214,515 | 207,690 | 3.29 |
| | OVERSEAS | 35,175 | 31,920 | 10.20 | 73,500 | 66,255 | 10.94 |
| **ARMY** | TOTAL | **137,340** | **129,885** | **5.74** | **288,015** | **273,945** | **5.14** |
| | CONUS | 58,027 | 58,921 | -1.52 | 116,262 | 118,427 | -1.83 |
| | OVERSEAS | 6,704 | 6,596 | 1.64 | 13,521 | 13,094 | 3.26 |
| **NAVY** | TOTAL | **64,731** | **65,517** | **-1.20** | **129,783** | **131,521** | **-1.32** |
| | CONUS | 10,899 | 12,039 | -9.47 | 24,875 | 26,684 | -6.78 |
| | OVERSEAS | 248 | 267 | -7.12 | 525 | 520 | 0.96 |
| **MARINE CORPS** | TOTAL | **11,148** | **12,306** | **-9.41** | **25,401** | **27,204** | **-6.63** |
| | CONUS | 236 | 236 | 0.00 | 508 | 497 | 2.21 |
| | OVERSEAS | 384 | 285 | 34.74 | 697 | 640 | 8.91 |
| **COAST GUARD** | TOTAL | **621** | **522** | **18.97** | **1,205** | **1,137** | **5.98** |
| | CONUS | $316,825 | $310,892 | 1.91 | $662,049 | $660,598 | 0.22 |
| **ALL** | OVERSEAS | $72,365 | $67,284 | 7.55 | $150,838 | $136,886 | 10.19 |
| **COMMISSARIES** | TOTAL | **$389,190** | **$378,176** | **2.91** | **$812,887** | **$797,484** | **1.93** |
| **GROCERY STORES** | U.S.[1] | $21.251 | $20.630 | 3.01 | $44.689 | $43.379 | 3.02 |

## EXCHANGES

| | | FEBRUARY | | | YEAR TO DATE | | |
|---|---|---|---|---|---|---|---|
| | | CY'87 | CY'86 | % CHANGE | CY'87 | CY'86 | % CHANGE |
| | CONUS | $195,652 | $224,149 | -12.71 | $418,525 | $428,839 | -2.41 |
| | OVERSEAS | 134,168 | 157,280 | -14.69 | 316,314 | 306,107 | 3.33 |
| **AAFES** | TOTAL | **329,820** | **381,429** | **-13.53** | **734,839** | **734,946** | **-0.01** |
| | CONUS[2] | 87,257 | 78,182 | 11.61 | 155,014 | 136,932 | 13.21 |
| | OVERSEAS[2] | 37,961 | 32,602 | 16.44 | 68,394 | 60,311 | 13.40 |
| **NAVY** | TOTAL[2] | **125,218** | **110,784** | **13.03** | **223,408** | **197,243** | **13.27** |
| | CONUS | 30,386 | 28,630 | 6.13 | 49,404 | 49,245 | 0.32 |
| | OVERSEAS | 4,856 | 4,586 | 5.89 | 8,782 | 8,910 | -1.44 |
| **MARINE CORPS** | TOTAL | **35,242** | **33,216** | **6.10** | **58,186** | **58,155** | **0.05** |
| | CONUS[3] | 6,105 | 6,230 | -2.01 | 11,449 | 11,683 | -2.00 |
| | OVERSEAS[3] | 455 | 464 | -1.94 | 853 | 870 | -1.95 |
| **COAST GUARD** | TOTAL[3] | **6,560** | **6,694** | **-2.00** | **12,302** | **12,553** | **-2.00** |
| | CONUS[4] | 1,885 | 1,541 | 22.32 | 3,236 | 2,905 | 11.39 |
| | OVERSEAS[4] | 2,597 | 3,205 | -18.97 | 4,071 | 6,840 | -40.48 |
| **MAIL ORDER** | TOTAL[4] | **4,482** | **4,747** | **-5.58** | **7,307** | **9,745** | **-25.02** |
| | CONUS | $321,285 | $338,732 | -5.15 | $637,628 | $629,604 | 1.27 |
| | OVERSEAS | $180,037 | $198,137 | -9.14 | $398,414 | $383,038 | 4.01 |
| **ALL EXCHANGES** | TOTAL | **$501,322** | **$536,869** | **-6.62** | **$1,036,042** | **$1,012,642** | **2.31** |
| **DEPARTMENT STORES** | U.S.[1] | $8.690 | $8.049 | 7.96 | $17.342 | $16.701 | 3.84 |

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges; exchange sales include concession volume.
NOTE: Distribution of sales by CONUS and overseas is based on definition by respective service and system. Figures do not include sales tax.
CORRECTION: Last month's calendar year headings should have been updated to 1987 and 1986, respectively.